Bridging the Proj Mgr/IT Staff Communications Gap

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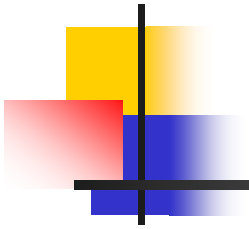

…OR…

How To Win Geeky Friends and Influence IT Staff

Outline of This Talk

- Background
- Focus on a few areas of communication between Project Management and IT Staff.
  - Outline of the issue
  - Illustrative example
  - Lessons learned
- Conclusion

Disclaimer

- The observations made in this talk are based on my personal experience.
- As with all “sweeping generalizations,” you will find exceptions.
- One of my early reviewers commented that it seemed that I was emphasizing “geek stereotypes.”
  - It appears that my personal experience happens to fit the stereotypes.

Inspiration

- IT Projects fail at a high rate.
  - Many of the successes are marginal.
- I have experienced several cases where miscommunication between Project Management and IT Staff have jeopardized project success.
- Communication is a persistent issue generally.
  - *How To Win Friends and Influence People* has sold over 15 million copies and is one of the 75 best-selling books of all-time.

Inspiration

- When starting my new job as an IT Project Manager, I reviewed (via iPod) Dale Carnegie's *How To Win Friends and Influence People.*
  - For those not familiar with the book, it…
    - …provides advice on listening to and communicating with others effectively.
    - …emphasizes the need for two-way interactions for successful communication.
    - …consists of short points amplified by examples and discussion.

Influencing People

Key Points from *How To Win Friends…* :

- **To get someone to do something, you must make them want to do it.**
- **To communicate effectively, you must understand the other person's point-of-view.**
- In my experience, these points seem to tax the Project Manager/IT Staff relationship, in particular.

Origin of Communication Gap

- IT Staff are largely self-selected, in that they selected a “geeky” career path.
  - Are better at getting computers to do something they are at getting people to do something.
  - Relate easily to odd computerese linguistics (constructed language) versus natural language.
    - Computer code commands uses an awkward verb-predicate-subject structure. (“Talk like Yoda, computer does.”)
  - Think in very literal terms. Computers do what you tell them to do and do not attempt to “interpret” or “spin” their instructions.

Origin of Communication Gap

- Project Managers are selected on a different basis.
  - Combination of technical knowledge, people-skills and procedural focus.
  - Work well with other people. Successful PM's are able to provide good motivation for their staff.
  - Often are required to "interpret" or "spin" directives (or, at least, to determine their implementation).

Problem Solving

- Project Management provides a broad approach to solving a problem:
  - Define Requirements
  - Develop Approach/Design
  - Implement Approach/Design
- IT Professionals (and many other tech pros) approach problem-solving via:
  - Implement Quick Fix (or “kludge”)
  - Redesign Quick Fix into Long-Term Solution
  - Tweak Solution as Needed to Meet Requirements

Why This is Common

The Quick-Fix-and-Tweak approach is a common business model in the private tech sector. It goes something like this (sarcasm added for emphasis):

a. Get buggy product to market quickly (get customers).
b. Listen to customer complaints.
c. Implement bug fixes in response to complaints.
d. Repeat until product or company is bought by Microsoft, Oracle, Cisco, Google or Apple.

Rethinking FISMA

The Federal Information Security Management Act (FISMA) levied new requirements for documenting and tracking IT Security status.

In our group, many smaller projects looked at the new requirements and were stunned at the work required.

The Information System Security Officials (ISSOs) for those projects rolled up their sleeves and started writing even though much of the work was common across the organization….

Rethinking FISMA

So, a team of ISSOs developed an effort-sharing and cost-savings approach using an informal project management model.

The upfront time spent developing and implementing a common approach made initial progress seem slow, but the final result was higher quality than otherwise.

All of the needed documents were completed and approved on time with significant cost savings.

Rethinking FISMA

Lessons Learned:

- When Project Managers assign complex problems to IT Staff, they should recognize the typical instinct to “get cracking.”
- When “Geeks” receive complicated assignments, they should pause and think about the process rather than simply trying to crank out results.

Reaction to Deadlines

- Project Managers learn which deadlines are absolutes, and which others are more elastic.
  - When communicating tasks and deadlines, indicate relative priority.
- IT Staff often do not see the nuances between absolute and flexible deadlines.
  - Some react to “impossible” deadlines by ignoring; others by dropping everything to achieve them.
  - Develop a “Plan of Action and Milestones” rather than ignoring an impossible deadline, or overworking the staff to meet it.

Confusion over skill sets

- How many Project Managers think of the IT staff skill set as simply “All Around Good With Computers?”
- As few years ago, it was possible for one person to be All Around Good With Computers, able to tackle and solve almost any computer problem.
- Increasingly complex issues, e.g. Active Directory, security, handhelds, are driving us towards more specialized IT staff. (Not all IT staff are fully on-board with this idea.)

Delivering the FDCC

The FDCC initiative requires specific configuration on all Windows XP and Vista computers in the Federal Government.

I was the IT Security Manager for our contract. The customer, “Chuck” wanted visible progress on FDCC implementation. (This is early in the FDCC process, before the agency developed tools or procedures.) The contract PM, “Liz” delegated this to me.

So, I created an FDCC image and found that some key software broke…

Delivering the FDCC

I had no experience in Windows internals and was at a loss to proceed.

I suggested to Liz that my skills were inadequate to the task, but that staff members “Linda” and “Mike” had the requisite skills and I asked for some of their time. No dice. I struggled along, with poor results.

After a time, Chuck complained about the lack of progress. Liz re-assigned FDCC to Mike.

Result: an unhappy customer, a frustrated PM, frazzled staff and time lost.

Delivering the FDCC

To my mind, this episode was a failure, so let's do a "Post-Action Review"

- Liz felt that I was Good With Computers and, with a little homework, could solve most IT problems.
- I, too, thought I was Good With Computers and, with a little homework, could solve most IT problems.
  - It took me a while to realize I needed to ask for help.
- When Liz balked at my first idea, I didn't suggest alternative approaches (e.g. training for me).
- I didn't relate to Liz's motivation (I.e. Chuck).
  - I didn't say, "I'm struggling and, unless I get help, we're going to miss Chuck's milestone."

Delivering FDCC

Lessons Learned:

- Communication relies on a mutual understanding of goals.
- It is necessary for the Project Manager to understand the skill sets of the IT Staff.
  - A way to tackle this is by discussing training.
- IT Staff need to be ready to clearly state when they are being asked to deliver outside of their area of expertise.
  - …and to discuss how to get the needed results.

Training

- Project Managers often see training as a way to acquire a specific skill that is currently lacking.
- Many IT Professionals view continuing training as necessary to keep up with a changing industry and apply new techniques to their current jobs.
- Annual training is required to maintain some IT credentials (e.g. CISSP).
- Training could be: attending classes, reading books or trade publications, or even writing.

Budget Cycles

- Finance, finance and finance.
- The IT world changes rapidly.
  - New software release not compatible with older versions.
  - New security threats require paying for upgrades or installing new tools.
- The fiscal cycle requires forethought and planning.
  - Requests for significant capital need to sync with the annual budgeting cycle, up to 2 years in advance.
  - Money ebbs and flows through the fiscal year.

Budget and IT Security

"Bill," an IT manager, saw a need to upgrade his project network for security reasons. This would require significant capital.

Bill would ask the Project Manager and the Resources Manager for money at the start of each fiscal year…often the worst time of the year to ask for money. Each year, he was told "we have no money."

Bill heard "we have no money [*this year*]" and would drop it for the year, while the DPMR meant "we have no money [*just now*]."

Budget and IT Security

Over time, the network's security fell behind and was inadequate to meet the threat environment. Inevitably, a computer in the network was hacked; the intrusion spread through the full network.

This had a huge impact on the project: finance, schedule, project deliveries.

Budget and IT Security

- Lessons Learned:
  - Talk with each other about money and budgeting.
  - Project Managers: ask about planned upgrades or improvements over the next few years.
  - IT Staff: learn how the organization budget works, get involved in budget planning.

Tricks that Worked (for me)

- Keeping a spreadsheet of current and future expenses and improvements (planned and unplanned).
  - Tracking spending versus plan, noting “found” money.
- Communicating regularly with the DPMR about money, especially near the end of FY.
- Weaseling myself into budget planning exercises.
  - Boring? Yes. But my new server was in the budget.

Definition of Success

- How do Project Managers know when they have succeeded in their job?
  - A successful delivery, recognized by one's peers or supervisor.
- How do IT Professionals know when they have succeeded in their job?
  - The complaints from management stop.
- IT staff are often only visible in the event of problems or failures.
  - Some IT pros and managers say this is desirable.
  - Interferes with planning, budgeting, etc.

Policy & Directive

- Policy documents are often open to interpretation and decisions about implementation.
  - This is often intentional.
- Provide IT Staff with guidance about “flexibility” in policies, directives and implementation.
- Encourage IT Staff to ask questions rather than assume the policy developer was uninformed or unintelligent.

Jargon

- Speaking in acronyms and jargon is an occupational hazard around NASA.
- This is exacerbated by the fact that some acronyms and jargon terms are re-used across different professions.
  - For example, there seem to be about a dozen things around here called “CMS.”
- Define acronyms and terms.
- Don’t be afraid to ask for definitions.

Recap

- Understand the urge to “quick-fix” or “kludge.”
- Discuss budgeting, professional skill mix and training needs with IT staff.
- Encourage questions about policy intent, jargon and finance, finance and finance.
- Encourage your IT Team to be more visible.
- Ensure that mutual goals are understood and communicated.

Conclusion

- IT Projects continue to be jeopardized by miscommunication.
- Project Managers and IT Staff (in particular) bring differing world-views to their interactions.
- The communications gaps can be bridged, but it takes understanding of the other's world-view.

Thank You For Your Time!

Questions?